QTAC Compass Instructions for Coordinators

1. One of our staff will create an account for you. Then, you will receive an automated invitation by e-mail to log into the portal and fill in the remaining registration information at https://compass.qtacny.org/login . You will have **48 hours** to activate your new account; after 48 hours the invitation expires, and you will need to contact livingwell@utah.gov to have another invitation generated and sent to you.

2. The FIRST time you login, the system-generated email with your login code may go to spam—check your spam folder for an email with "QTAC" in the title. Also, the FIRST time you login, if you put a landline as your primary contact telephone number, make sure you list "voicemail" NOT "text message" as the way to receive the login password.

3. After updating your account with a unique password, you will need to **verify** your account by receiving a text or voice message. Then you can log in at https://compass.qtacny.org/login with your e-mail address and password.

4. Once you log in, you'll see your **Dashboard** (Home) screen.

1. You can also view **Alerts** and **Help Topics**.

2. From the Dashboard, you can view the workshop calendar by **month**, **week**, or **day**.

3. You can also view a **Workshop** by clicking on the calendar.

4. First, create a new Implementation **Site** if your site doesn't already exist in the portal, before you create a new Workshop.

5. Then, click on the **Add New Implementation Site** button. You can also **view** and **edit** the Implementation Sites associated with your agency.

6. Enter the required information, and then click the **Save** or **+ Save and Add** button at the end to add your new **Implementation Site**.
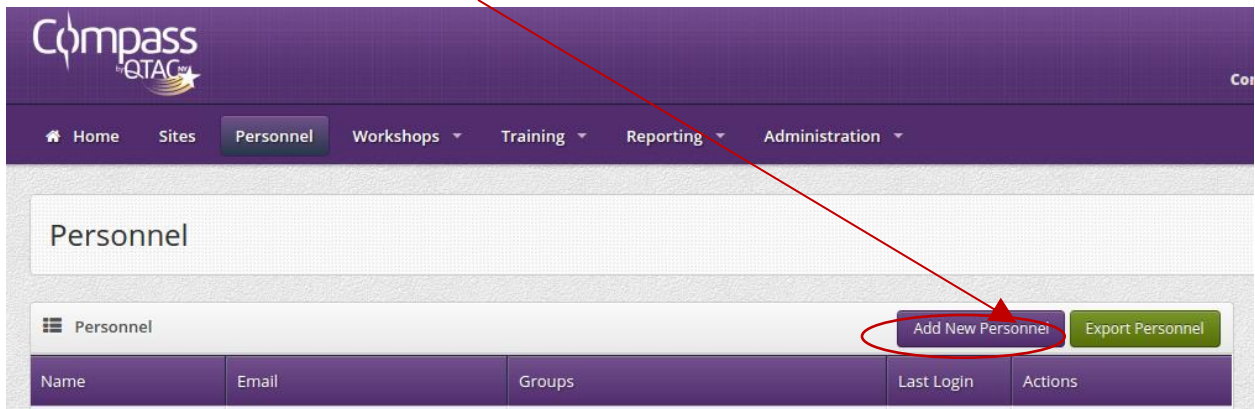
7. Create new **Personnel**, if needed.
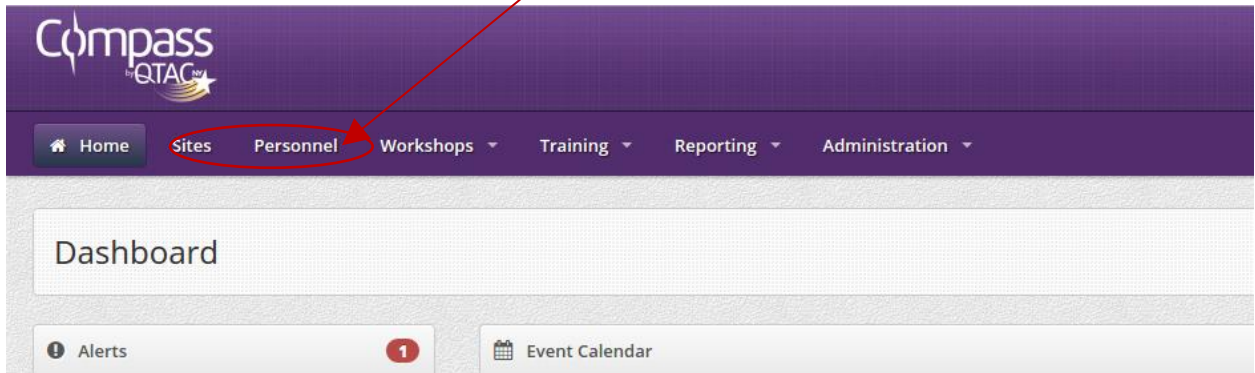
8. Click on the **Add New Personnel** button.

9. Enter all of the required **Personnel** information and click the **Save** button.

Add New Personnel - Account Information

Account Information

Owner *   Utah

First name *

Last name *

Email

Phone numbers   [+ Add] [🗑 Delete] [☐]

Street Address

Address Line 2

Account Information

Email *   [_____]

Groups *   ☐ Implementation Site - Staff
         ☐ Master Trainers
         ☐ Workshop Leaders

Implementation Site Access   [_____]

Subscriptions

Subscriptions   ☐ New Participants - Notify by e-mail when new participants are registered for workshops.
         ☐ New Workshop - Notify by e-mail when new workshops are created.

[✔ Save] [+ Save and Add] [▤ List]

10. Creating a **NEW workshop**: Go to the **Workshops** menu item at the top, and then click on **Add New Workshop**.
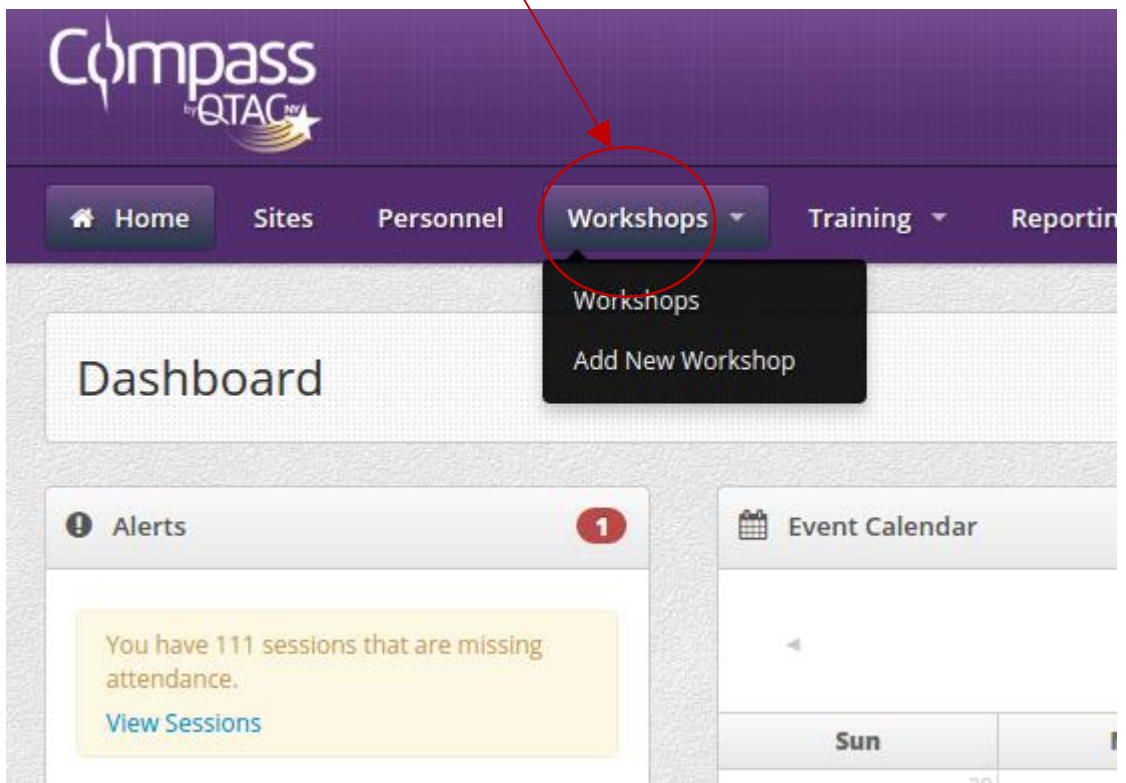
11. Fill in all of the information for a **New Workshop**, then click **Next->**.

Add New Workshop

Program *	Arthritis Foundation Exercise Pi ▼
Implementation Site *	Alta View Hospital ▼
Private Workshop?	☐
	Should this workshop be hidden from public registration and se
Contact Phone *	[ ] [ ] [ ] ext. [ ]
	What phone number (and, optionally, extension) should particip
Contact E-mail *	[ ]
	What e-mail should participants see to send questions/inquiries
Language *	English ▼

12. Workshop description: good place to put classroom directions here and what room number your workshop will be held in:

Workshop Description: Classroom Directions (Watch for Signs)
- Enter the Hospital through the Main entrance or Visitor entrance.
- After you enter the building, walk south toward the Café.
- Before you enter the Café, the education center will be on your left.
- Walk down education center hall and room numbers will be posted next to room doors.

Class will be held on the following dates:
- April 7th, 10am-12pm, Classroom 5
- April 14th, 10am-12pm, Classroom 5
- April 21st, 10am-12pm, Classroom 3

13. Fill out the information for the **session days**, **start date** and **start time**.

14. After you click **Finish**, you will see the details of the workshop you created below.

15. You can download the ***Workshop Data Packet*** (**Attendance Log**, **Participant Information Form (PIF)**, or **Participant Post Program Survey,** or **Booster Session Survey)**.

16. At the bottom of the Workshop Details page, you can view the **Leaders** information, the **Schedule**, and **Add New Participants** or **View Participants**.

17. **Add New Participant**: To add new Workshop Participants, click on the **+ New Participant** button and enter the participant data and click **Save**.
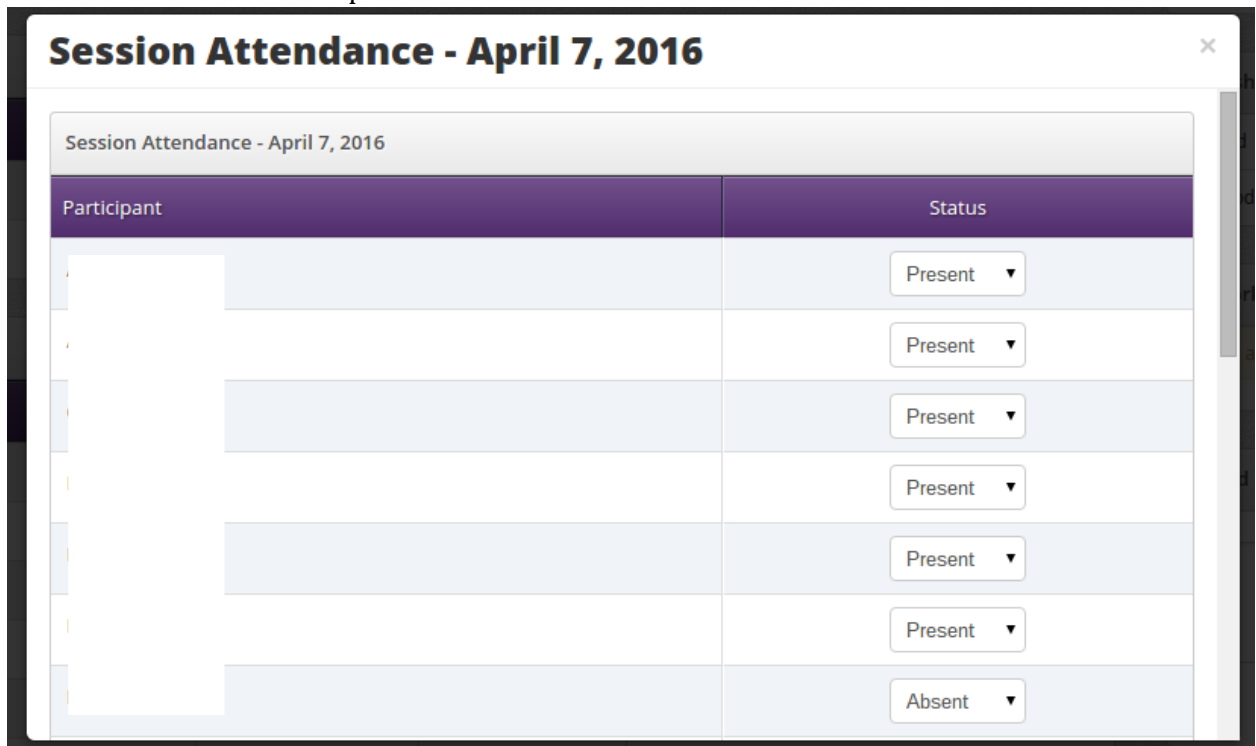
18. **Attendance Log**: you can visit the **Workshop Details** page after each workshop and update the Schedule with the attendance.

Workshop Attendees are marked as **Present** or **Absent**.

*make sure ALL of your participants are added to the workshop before you complete the attendance logs.

19. You can also input the data you receive from PIFs into Compass by clicking on **Stepping On Participant Information Form** and filling out the form with the information they provided on their PIF.

Once you click on the link you will see the questions from the PIFs:

You can also edit contact information for participants:

Once you click on the link you will have the option to edit the participants contact info:

Editing User:

Workshop	(McKay Dee Hospital) SO - UT-461-4370
Registration Date	2/11/2016 📅 The date that the participant actually registered for this workshop.
First Name *	
Last Name *	
Street Address	
Address Line 2	
City	Roy

20. **Export Participant data:** to contact participants who have registered in Compass:
- Click on the upcoming workshop (either from the calendar or from the "Workshops" button towards the top left side of the page)
- Scroll down to where it says "Workshop Participants"
- To the right of where it says "Workshop Participants," click on the blue box that says "Export Data"
- From the dropdown box, click on Participant Information
- This will automatically download the contact information from all registered participants into an Excel file.
- Once it downloads, double-click the Excel file to open (in the bottom left corner if you are using Chrome). NOTE: You will need to widen the columns to view participants' full email addresses and phone numbers.

👥 Workshop Participants				+ New Participant ☁ Export Data ▼
Registered	**Name**	**Attendance**	**Surveys**	**Options**
2/11/2016		100%	Stepping On Participant Information Form (Edit)	Edit Sessions Delete

21. **View Workshops**: go to the **Workshops** menu at the top, and click on **Workshops**. You can also **Add a New Workshop from** here or edit existing workshops.

You can also view workshops from the homepage/dashboard on the calendar. Click on the workshop to see details.

22. **View Delivery Personnel** (Leaders): go to the **Personnel** menu and the list will appear.

23. **Account Settings**: go to your settings to **Edit Your Profile** information.

24. Change your **subscriptions**, update your **password**, or **Update Security Profile**.